

SAP CONCUR How-To Sheets

Adding Multiple Documents to an Expense Report

Documentation is required to support your expense reports. You may have to attach multiple documents to an expense line or add extra documents to the report.

This how-to sheet outlines the steps required to:

- Add multiple documents to the same expense line
- Add a document to the report

THESE INSTRUCTIONS ASSUME YOU ARE WORKING FROM A DESKTOP COMPUTER/ LAPTOP

1a. Attaching a second document to an expense line ...

A report has been started.

An expense line has been created with a legible, itemized receipt attached.

In this example, a conference agenda is required in addition to the receipt. A conference registration is required to show whether meals have been included in the conference agenda. Carleton policy does not allow a travel allowance to be claimed for meals that have been paid for through conference registration fees.

The screenshot shows the SAP Concur 'New Expense' form. The 'Expense Type' is 'Conference/ Registration Fees', the 'Account Code' is '719100 - Conference, Meeting Tr...', and the 'Transaction Date' is '17/02/2021'. The 'Amount' is '175.00' and the 'City of Purchase' is 'Ottawa, Ontario'. The 'Payment Type' is 'Out of Pocket' and the 'Receipt Status' is 'Receipt'. A receipt from 'Eliucian' is attached to the expense line. The receipt details include 'Eliucian LIVE 2021', 'now more than ever...', 'Invoice No: 022', 'Created: 17 Feb 2021', and a table of items:

Item	Qty	Type	Price	Total
Full Conference Pass	1	Payment	\$175.00	\$175.00
Total			\$175.00	\$175.00

The receipt also shows 'Associated Payments' and 'Total' of \$175.00, with 'Total Payment' of \$175.00 and 'Balance Due' of \$0.00.

- 1b. To attach a second receipt, click the blue 'Save Expense' button.

The screenshot shows the 'New Expense' form in SAP Concur. The 'Expense Type' is 'Conference/ Registration Fees', 'Account Code' is '719100 - Conference, Meeting Tr...', and 'Amount' is '175.00'. The 'Save Expense' button is highlighted with a green arrow.

- 1c. In the new screen, click on the expense line.

The screenshot shows the 'Adding to pick list' screen. The expense line is highlighted with a green box:

Expense Type	Account Code	City of Purchase	Vendor	Transaction Date	Amount
Out of Pocket	Conference/Registration Fees	Ottawa, Ontario	Ellician	17/02/2021	\$175.00

- 1d. There is now an 'Append' button.

TIP: Depending on the size of your screen, you may need to scroll down to see the 'Append' button.

In this example, the 'Append' button can be used to attach the conference agenda.

The screenshot shows the 'New Expense' form with the 'Append' button highlighted by a green arrow. The 'Expense Type' is 'Conference/ Registration Fees', 'Account Code' is '719100 - Conference, Meeting Tr...', and 'Amount' is '175.00'. The 'Append' button is located at the bottom right of the form.

2. Attaching documents to an expense report.

You can also attach documents to the report.

To do this, click on the blue 'Manage Receipts' text and click on 'Manage Attachments'. Follow the prompts.

The screenshot shows the SAP Concur interface for an expense report titled "Software and Keyboard March 2021 \$625.21". The report is marked as "Returned". The interface includes a navigation bar with "SAP Concur", "Requests", "Travel", "Expense", "Approvals", and "App Center". Below the navigation bar, there are tabs for "Manage Expenses" and "Cash Advances". The main content area shows the report title and a "Returned" status. A green arrow points to the "Manage Receipts" dropdown menu, and another green arrow points to the "Manage Attachments" option in the dropdown menu. Below the dropdown menu, there is a table with columns: Alerts, Receipt, Payment Type, Expense Type, Vendor Details, Date, and Requested. The table contains two rows of expense items, both marked as "Out of Pocket" and "Allocated".

Alerts	Receipt	Payment Type	Expense Type	Vendor Details	Date	Requested
<input type="checkbox"/>		Out of Pocket	Computer Equipment/Software Supplies	Vyond Ottawa, Ontario	01/03/2021	\$600.00 Allocated
<input type="checkbox"/>		Out of Pocket	Computer Equipment/Software Supplies	Staples Ottawa, Ontario	01/03/2021	\$25.21 Allocated
						\$625.21

What next?

- Visit carleton.ca/facts/travel to find more how-to sheets.
- Questions about the system? Email financial.systems@carleton.ca.